

IowaAccess  
Project 9 - STAWRS  
Team Meeting  
December 18, 1997

Team Members In Attendance:

Wayne Cooper  
Renny Dohse  
Rita Cusp, IWD  
Jan Mowen, IWD  
Paulette Day  
Darrell Bauman  
Diana Thompson, IWD  
Rich Columbo, IRS  
Donna Hockensmith, IRS  
Software Control International representatives  
    Jim Green  
    Howard Lichtman  
    Ronald Butler  
    Bob Carberry  
    James Rowland

Staff:

Ruth Melone  
Joe Shannahan

Results of Project 9 Business Survey

Venenga reported that 1,000 surveys were mailed out (random sampling within a class, include industrial groups). 242 surveys were returned, which is a good response rate. Shannahan reported that the survey was broken out by industry, company size, and who prepared the tax report. Most Iowa businesses see at least a minor benefit to the combined paper form. Among all the different industries, it was perceived that government would be more efficient with a combined paper form, but didn't see a direct benefit to them. Tax preparers were as a whole the most negative. There were six employers who were willing to participate in a pilot project.

The Iowa survey doesn't relate well to the Montana survey. In that survey, a lot of the comments didn't necessarily agree with other responses. The smaller employers in Montana were more positive than the larger employers.

#### Iowa Access Business Survey

Shannahan reported. The survey sampled agriculture businesses, MIS officers, and CEOs. The MIS directors were most interested; CEOs also showed interest. Agricultural firms expressed little interest, but more than 50% supported the concept as a whole. 90% of people surveyed said it would be acceptable to pay a fee to use online services.

#### Update on Electronic Filing and Technology Issues

The committee had no changes to suggest on the form. It is not in its final form yet; there may be changes. There was discussion regarding a description of how we could help with the paper filing process as that becomes an electronic message. It's necessary to be able to identify the source of the data, whether it's paper or electronic form. It's important to get the data in the proper format; that issue should be worked out with the data entry contractor. Can the data entry contractor get the information into mag tape format? Iowa would like to follow the model of a log on, a password, and PIN number. Jim will be in touch to work out the details and formulate answers to the questions. Jim will fax the questions to Wayne and Larry, and will follow up with a call on Monday. Butler reported that SCI is committed to moving ahead with the prototype and test period. The turnout itself is an encouraging number.

#### Update on Combined Paper Filing Issues

Dohse and Hockensmith reported. After the survey result, and after attempting to find employers who are willing to participate, there are some concerns on the state side for the combined paper form. Hockensmith stated that it is the state's decision on whether to move forward on the issue. Dohse stated her concern that it will be difficult to find even 20-40 employers willing to participate. Hockensmith stated that 20 would be sufficient if the state wants to continue with the combined paper form. The form needs to go through OMB and get a number, etc. Iowa will work on identifying employers for the combined paper filing.

#### Update on Pilot Selection

Cooper reported that there are five employers who are willing to pilot electronically. All are on Windows 95. There is one diskette/mag tape filer. We need to identify a payroll processor. SCI is speaking with ADP about the pilot, and should hear back within a few days. Rita offered to try to identify additional employers. Jim will want to speak with Rita about who to contact. SCI volunteered to help speak with employers and explain to the process and issues to them. Cooper stated that Jim and Rita will take the lead on identifying electronic filing.

#### Discussion on Education Needs

Electronic combined filing: SCI stated that at this point, there is nothing to show the team or pilot employers. That process can start in 1998. Columbo offered to put together an outline for the education.

Combined paper: Hockensmith reported updating the instruction booklet for the combined paper form.

#### Update on Evaluation

Paulette has started on an evaluation plan. Issues included will be accountability, effectiveness, impact of projects, and anticipated project outcomes. The evaluation will be ongoing. Business case evaluation criteria - have an exchange of what IRS would consider basic and essential. First draft of the evaluation form will be included

#### Update on Web Page

Venenga reported. Erwin has found the server, and is working with Lowell Sneller at ITS. There are several forms that are missing. Erwin has contacted Tony Hendrickson at Iowa State, to see if those forms can be included. Venega may ask Cooper and Dohse to work with Bowman on making sure the Web page has all the proper information. Cooper reported that the server and the scanner are unhooked and ready to be moved to IWD. Columbo offered to link their site with Iowa's site.

#### Other issues

Columbo wondered if local software developers had expressed any interest in the project. None so far in Iowa. Columbo suggested on the Web page to add a statement to the Web page offering to send information to them.

There is no news regarding what Grassley will do on the bill.

#### Next Meeting

The next team meeting is scheduled for February 19, 1998, from 1:30 - 3:30 p.m.